STRICOM
Omnibus Contract
(STOC)
Training

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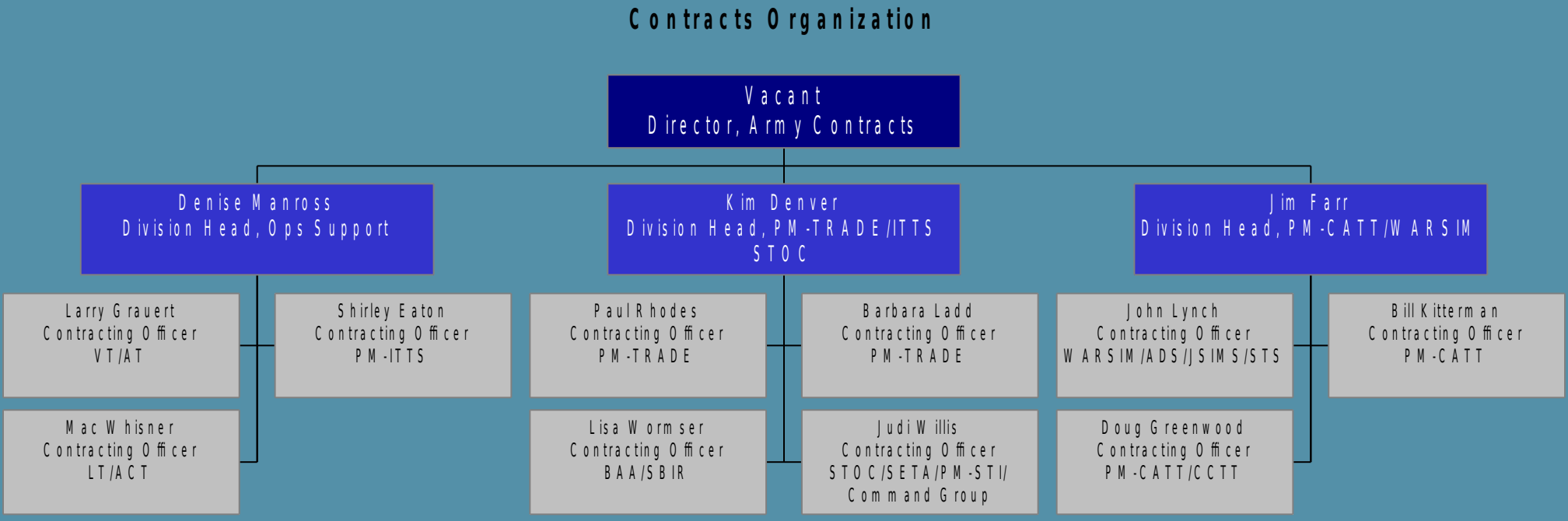
Part I: Purpose of Training

Familiarize and educate the realm of possibilities under STOC

STOC IS NOT the same old way of doing business

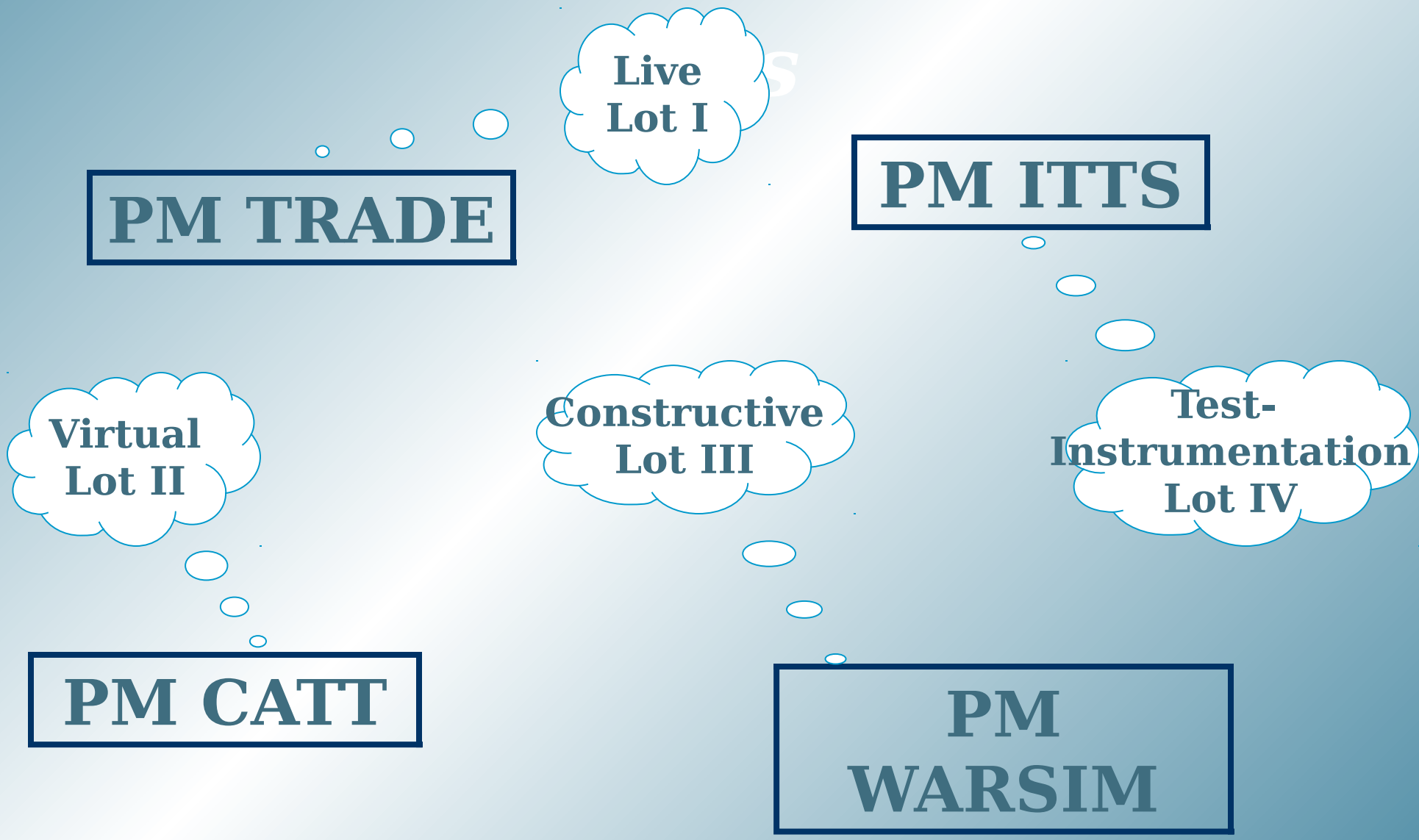
C-Dir Organization



STOC Point of Contacts

- Basic Contract POCs
  - Contracting Officer
    - Ms. Judi Willis
  - Contract Specialist
    - Ms. Melissa Cossentino
    - Mr. Tom Bunch
- Delivery/task order POCs
  - Contracting Officer and Contract Specialist will vary

Relative Relationships Domains to STRICOM



DCMA Point of Contacts

- DCMA POC (located on-site)
  - MAJ Cynthia Sherman, Overarching Program Integrator
    - Comm: 407-384-8323
    - cynthia_sherman@stricom.army.mil
- DCMA participation on all overarching IPTs
  - **review all delivery orders prior to award**
  - help transition history/lessons learned from one STOC DO/TO & Contract Mgmt. Office (CMO) to the next
  - supports acquisition planning efforts and post award administration synergism

DFAS Points of Contact

- **DFAS Ombudsperson**
  - **Ms. Mary Seal, Financial Specialist**
    - Comm 1-800-756-4571, Option 6
    - email: Mary.seal@dfas.mil
- **DFAS will provide payment instruction training to STRICOM PCOs, and STOC Contractors in a future conference**
- One CLIN - one ACRN required
- Specific payment instructions needed for each DO
- Refer to DFARS Part 4 - 204

STOC Ombudsperson

- FAR 16.505(b)(5) and contract clause H.14
  - Reviews concerns from contractors on delivery/task order contracts
  - Ensures awardees are afforded a fair opportunity to be considered
  - Independent of the contracting officer
- STOC Ombudsperson is Ms. Leah Treppel
  - Comm (407)384-3763
  - ombusdman@stricom.army.mil

STRICOM Omnibus Contract Part II

What is STOC?

STOC Overview

- Multiple Award ID/IQ Contract
  - 33 total awardees
  - Small Business Set-aside
  - Full & Open Competition
- Four Lots representing different expertise
- Eight Year Contract
- Any contract type can be used
  - only 3 included in T&C (CPFF, FFP, and T&M)
  - See clause H.12 in basic contract
- $4B Ceiling
- Virtually no protest risk

STOC Contract

- **Accommodate support at any phase of the acquisition cycle**
- **Interim logistics support available to transition to LCCS contracts**
  - **Associate Contractor Agreement with LCCS Contractors**
- **Scope of Basic STOC allows the purchase of any system/support for Simulation, Training and Instrumentation throughout the four defined areas in accordance with STRICOM Charter.**

STRICOM Omnibus Contract

Part III

The Process

The Process
STOC User's Guide

- **Living document**
- **Purpose**
  - Provides basic information on the successful use of the STOC contract vehicles
  - does not attempt to dictate the acquisition method to be used
  - captures the statutory, regulatory and policy "wickets"
  - should not be used as the sole source of information when developing your acquisition strategy
  - use any and all information at your disposal
  - let sound business sense and ethical judgement guide you to the "right" decision for your customer

The Process

(1) Understand the requirement

- is this a commercial item?
- is this a single event or multiple event?
- is this a new start or a follow-on requirement?

(2) Develop an understanding of where it fits in STOC

- Identify Contractors (market research)/Set-aside or Full & Open?
- Identify domain

(3) Think about your Acquisition Strategy (draft)

(4) Present to A-Dir leadership, legal, PDA, PM & Small Business office in an informal (brainstorming) forum

- verbalize approach
- draft evaluation criteria

The Process

(5) Finalize Acquisition Strategy

(6) Determine if SOO, SOW and/or SPEC

(7) Prepare MEP & letter RFP

(8) Route/Receive approval of MEP/RFP

(9) Release to industry

(10) Receive and evaluate proposals

(11) Source Selection decision

(12) Finalize Order

The Process

MEP required for all Delivery Orders

- tailor content to the complexity of the acquisition
- see STOC User's guide for review and approval thresholds

The Process

MEP - items to include

- Mission
- Background
- Program Direction
- Program Content
- Acquisition Strategy
- Management Strategy
- Technical Eng. Approach
- Support Strategy
- Test Approach
- Financial Management
- Security Procedures
- Risk Assessment
- Program Issues

Who, What, Where, When, Why, How

Requirements

Department of Defense Handbook for Preparation of Statement of Work (SOW)

- **MIL-HDBK-245D dated 3 April 1996**

Difference between SOW, SOO, and Specification

- SOW specifies in clear terms the work to be done in developing or producing the goods to be delivered or services to be performed
  - defines all work (non-specification) performance requirements for contractor effort
- SOO provides basic, top level objectives of the acquisition
  - provided in RFP in lieu of SOW
  - provides offerors flexibility to develop cost-effective solutions and opportunity to propose innovative alternatives to meet solicitation objectives
- Specification contains qualitative and quantitative design and performance requirements
  - typically referenced in SOW

Requirements

SOW is a standard for measuring contractor performance

- Must be consistent with all sections of the RFP
- Sections of SOW
  - Section 1 - Scope
    - brief statement of what the SOW includes
  - Section 2 - Applicable Documents
    - any documents referenced in SOW should reference specific version
    - refer to DFARS 252.211-7000
  - Section 3 - Requirements
    - identifies specific work tasks
      - developed to satisfy program needs
- Paragraph Numbering
  - Requirement 3
    - 1st sub-level 3.1
    - 2nd sub-level 3.1.1

Requirements

SOO states overall solicitation objectives

- Developed to be compatible with Mission Need Statement (MNS), Operational Requirements Document (ORD), Systems Requirements Document (SRD)/systems specification, and draft Work Breakdown Structure (WBS)/dictionary
- Replaced at contract award in the contract by the proposed SOW
- Sections of SOO
  - Section 1.0 - Program Objectives
    - Multi-phase program
    - One program, multi-contractor
    - One phase contract
  - Section 2.0 - Contract Objectives (WBS 0000)
    - objectives in paragraph 2.00 are traceable to Level 0 WBS
      - each WBS element should be traceable to something in SOO
    - for multi-phased programs, describe objectives for each phase in a format similar to an indentured list

The Process
RFP preparation

- RFP
  - May take many forms and have multiple phases
    - Dependent upon the stage in the acquisition process
    - Dependent upon the dollar value of the effort
  - Several approaches
    - Identify What, When and How to present
      - White papers
      - Oral proposals
      - Written proposals
      - COMBO

What do we want and how do we use it

The Process
RFP preparation

- Examples of approaches:
  - Downselect
    - Capability Briefings on the I drive (STOC/Capability Briefs)
    - Eliminate those with Past Performance problems on previous DOs
  - Direct to select
    - state what you want and select source
- Be clear- tell industry exactly what you want
  - incorporate flexibility
  - let them understand the government's options

The Process

- Route all documents for approval
- Release RFP to Industry
- Receive Proposals
  - various approaches to evaluation
    - based on complexity of program and phase of acquisition
  - Recommendation from evaluation team can be
    - Simple as a consensus memo for record (or)
    - Complex as individual evaluation worksheets compiled into evaluation team report of consensus recommendation

The Process

- Purpose of recommendation document
  - document findings of evaluation
  - recommend award
  - document trade-offs, if required
  - recommend feedback to industry
- Decide on next step
  - request more information, down-select, alpha, delta, award?

The Process

Source Selection Criteria

- Consider
  - discriminating factors that will lead to a successful award
  - limit to just those items that are absolutely necessary
  - establish priority or relative order of importance
  - include “standards” as part of evaluation criteria
  - no need for separate PEP, but not precluded

The Process

Source Selection Criteria

- Instruction to Offerors (Section L) and Criteria (Section M) go hand in hand
- Determine what you are looking for when defining your criteria
- Sections L and M are to be looked at collectively - not individually

MILES XXI Criteria

- **Production Capacity/Producibility Factor:** The Government will evaluate the extent to which the offeror can satisfactorily produce the proposed quantities of MILES XXI within the proposed delivery schedules. Maturity of design, producibility of proposed products, availability of materials, status of internal test, status and efficiency of production line, and identification of risks/effective risk mitigation plans are key elements that will be evaluated.

- **Future Instrumentation Factor:** The Government will evaluate the extent to which the proposed MILES XXI systems can accommodate the addition of instrumentation and other technological advancements. Insertion of future instrumentation with minimal operational and cost/price impact is highly desired.

MILES XXI Criteria

- **Operations Impact Factor**: The Government will evaluate the extent to which the proposed MILES XXI system will enhance force-on-force training. Emphasis will be placed on interoperability, commonality, and intrusiveness (reduction in training required to operate the system).

- **Logistics Support Factor:** The Government will evaluate the extent to which the proposed MILES XXI products will improve the supportability and maintainability of the proposed system. Specifically, the Government will evaluate the extent to which the proposed system will decrease the cost of logistical support from a short-term (during the actual fielding) and long-term (throughout the life of the product) perspective.

The Process

Alpha Contracting

… uses a team approach to prepare, evaluate and award proposals in substantially less time than the traditional approach to sole source contracting. It involves the government, the contractor and principle subcontractors working together to bypass the solicitation and proposal phase to draft a "model contract." Price and technical details evolve to produce the actual contract document.

Use if Sole Source from day one

The Process

Delta Contracting

...employs Alpha contracting techniques in a competitive environment. Unique challenges reside within the competitive environment that require a clear understanding of the boundaries of communication and exchanges with industry.

Use if Full and Open from day one

The Process

- Source Selection Decision
  - Serves as the independent assessment and selection decision
  - May be included in BCM or BCM-like document (efforts under $500K)
    - BCM could encompass pre/post negotiations
    - BCM will contain what the award decision was based on
      - Guidance provided in FAR 15.406-3(a)
  - May be stand-alone document

The Process
Considerations if Sole-Source

Issued on sole-source basis if the Contracting Officer determines (FAR Part 16.505(b)(2)):

- (1) The agency need is of such urgency that competition for the Task order would result in unacceptable delays.
- (2) Only one awardee is capable of providing the supplies at the required level of quality due to the unique or highly specialized nature.
- (3) The Task order should be issued on a sole source basis in the interests of economy and efficiency as a logical follow on to a previously issued order.
- (4) It is necessary to place a Task order to satisfy a guaranteed minimum.

The Process
Considerations if Sole-Source

FAR Part 6

- **No J&A required to issue a delivery order on the basis of other than "Full and Open Competition"(FAR 16.505(b)(1)(ii))**
- **However, Contracting Officer must document decision (FAR 16.505(b)(4))**

The Process

Considerations - Award Items

- If eliminating offerors after receipt of proposal, the Contracting Officer must prepare a decision document (memo for record)
  - Meat of document is provided by evaluation team
- If >$50M, present final award to NAVAIR
  - to NAVAIR 2.0 by e-mail
  - requesting acknowledgement (not approval)
- Congressional Notification / Contract Announcement
- Significant awards (> $5M)
  - send to PAO (Mary Trier/Michelle Milliner)

The Process

Considerations - Small Business

- Small Business subcontracting plan (>$500K)
  - Applicable to large business primes and not-for-profit primes
  - Corporate plans will be incorporated at the contract level - no need for plan at DO level (see STOC contractor matrix on STOC Knowledge Portal)

The Process

What do you need to incorporate at the D.O. Level?

- Special Terms & Conditions (considerations)
  - Low Rate Initial Production (LRIP)
  - Data Rights
  - 1st Article Testing
  - Inspection and Acceptance
  - Other T&Cs
- Facility codes - place of performance
- Payment instructions

The Process

What do you need to incorporate at the D.O. Level?

- Performance Based Payments
  - Performance measured by objective, quantifiable methods
  - Accomplishment of defined events
  - Other quantifiable measures of results

Note: The contract must be a definitized fixed-price type contract

The Process
Considerations - Best Practices

- Communicate with Industry throughout The Process
  - Use and Frequency of Teleconferences
  - Oral Presentations
- Awareness of our responsibility to minimize B&P costs
- Follow Ordering Procedures in FAR Part 16
  - Employ parts of Part 12 & 15 as needed

The Process
Considerations - Other

- Past Performance Evaluation Criteria
  - may be required at delivery/task order level
  - tailored to specific effort
- Past Performance Record
  - track past performance on STOC delivery/task orders for use in subsequent competitions - CPARS
- Subcontractors may be added at any time to enhance team's capability

The Process
Considerations - Other (cont'd)

- DD254s
  - Basic DD254 identifies Secret clearance
  - Top Secret/SI Clearance must be requested from Redstone Arsenal-Huntsville
- Theater Clearance
  - Germany
    - tax issue
    - work permits
  - Korea
    - Status of Forces Agreement (SOFA)

The Process

Considerations - T&M Rates

- T&M Rates
  - Applicable for three years
  - Identified in Section B.2
  - Sole labor rates allowable for all labor hours, prime and subcontractor, billable for T&M task orders

The Process
Post Award

Feedback to all offerors

- Feedback to successful offerors aids in post award
- Feedback to all offerors makes for better proposals in future
- Feedback = strengths/weaknesses/proposal risks

Meaningful Feedback is Key

STRICOM Omnibus Contract

Part IV

External Customers

External Customers

- STRICOM is currently in the process of identifying a single entry point or “Cell” for new requirements - PM-STI
  - PM-STI POCs are TBD
  - Entry points for new requirements
    - Through PMs & Directorates
      - Coordinate through PM-STI
    - Through PM-STI
      - Coordinate through PMs & Directorates

External Customers

- No guarantee contractor will receive the work it brings in
- New guidance from Office of Assistant Secretary of the Army dated 7 Nov 2000
  - "…contractor was responsible for proactively working with a program office in the development of a particular requirement, some consideration/weight should be given to that in the award decision"
  - Price shall be considered in ordering process
  - Past Performance information (quality, timeliness, and cost control) on earlier orders placed under STOC will be considered
- If particular expertise is known, it will be passed on to community

External Customers

Access Charge

- **1.5% up to $20M applied to customer funds**
  - **Command incurred costs included in the access charge:**
    - operation & maintenance
    - facilities
    - graphics
    - financial management
    - utilities
- **No access charge applied on remaining balance above $20M**
- **Effective 1-Apr-01 for new customer initiatives/work received on MIPR or FAD via PBAS**
- **PM support is negotiable**
  - dependent upon number of workyears needed
  - flat rate of $125K per work-year exclusive of travel

STRICOM Omnibus Contract

Part V

Current Issues

Current Issues

Associate Contractor Agreements

- Ensures complete compatibility and interoperability between equipment, data, and services
  - Seamless transition of support from OEMs to LCCS contractors
  - prevent unnecessary duplication of effort
  - maximize commonality
- Ensures appropriate coordination/integration of work between the contractor under a delivery/task order and other Government contractors including Life Cycle Contractor Support (LCCS) contractors, as applicable
- Provides for complete and unbiased exchange of technical information and interface data relating to detailed responsibilities and procedures
- Submitted to the Government for review prior to execution
- May be made as an attachment to the D.O./T.O.

Clause H.19 of Basic Contract

Current Issues

Associate Contractor Agreements

CONTENTS

- Identify data and information to be furnished among associate contractors
- Identify the processes and procedures for exchanging working technical information and data in an Integrated Process Team environment
- Facilitate the performance of the respective contracts or Life Cycle Contractor Support
- Identify period(s) of time the services are to be provided
- Identify materials to be provided to each other by the respective contractors in performance
- Identify facilities and their location
- Delineate respective interface responsibilities
- Contain provision for furnishing copies to communications relative to performance of associate contractor responsibilities

Current Issues
Organizational Conflict of Interest

Contracting Officer's Responsibilities

- Identify and evaluate potential organizational conflicts of interest as early in the acquisition process as possible
- Avoid, neutralize, or mitigate significant potential conflicts before contract award
- obtain the advice of counsel and the assistance of appropriate technical specialists in evaluating potential conflicts and in developing any necessary solicitation provisions and contract clauses
- recommend to the head of the contracting activity a course of action for resolving the conflict (prior to issuing a solicitation)
- contracting officer's judgment need be formally documented only when a substantive issue concerning potential organizational conflict of interest exists

Current Issues
Organizational Conflict of Interest

Procedures

If the contracting officer decides that a particular acquisition involves a significant potential organizational conflict of interest, the contracting officer shall, before issuing the solicitation, submit for approval to the chief of the contracting office (unless a higher level official is designated by the agency)

- **written analysis**
- **A draft solicitation provision (see 9.507-1)**
- **If appropriate, a proposed contract clause**

Future Contract Modifications

- Section B
  - Deobligate $10K off of the basic contract as delivery/task orders are issued that satisfy the minimum
- Section F
  - Incorporate ordering periods for each Lot
- Section H
  - Incorporate clause identifying Subcontracting goals
  - Incorporate PCO and Patent Counsel office information
- Other?

STRICOM Omnibus Contract

Part VI

Resources

W drive
&
STOC Knowledge Portal

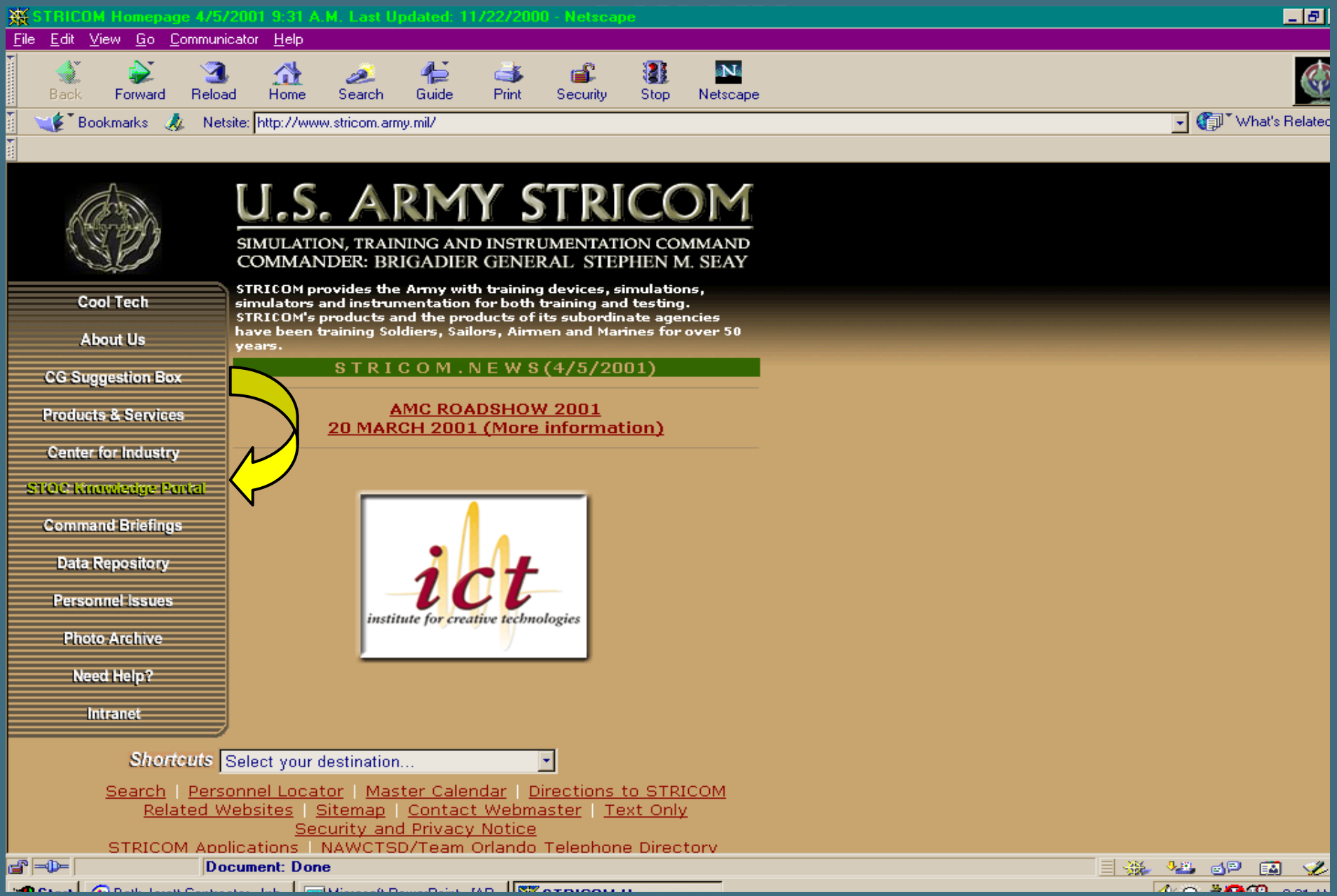
Resources -W drive

- **Sample documents**
- **Ceiling tracker**
- **Awarded DO/TO tracker**
- **Policy & Procedures**
- **Basic STOC Contracts**
- **Matrix of Awards**
- **POC listing**
- **Etc, etc, etc…..**

Resources -W drive

- **Responsibilities of the Contract Specialist**
  - **RFP Tracking**
    - Password Protected
    - Must see Melissa, Freda, or Paul
  - **DO/TO assignment/tracking**
    - Password Protected
    - Must see Melissa, Freda, or Paul
  - **Tracking sheets - <u>responsibility of contract specialist</u>**
    - Excel spreadsheet for each contract
    - Tracks both DO/TO and Modifications
  - **Awarded DO/TO spreadsheets (delineated by domain)**

Resources-STOC Knowledge Portal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Resources
(STOC) Knowledge Portal

- **Matrix of basic STOC awards**
- **Primes & Subs listing**
- **POC listing**
- **Basic SOW & Handbook**
- **RFPs and Final Delivery Order (DO) Postings for all STOC projects**
- **Notice of upcoming work opportunities**
- **Provide controlled access to Proposal data in response to an RFP (propriety communication between the contractor and STRICOM)**
- **Separate training will be provided on Knowledge Portal**

The Road Ahead

- STOC IPT
- STOC User’s Guide finalization
- On-going training - share what we learn

Questions & Comments